Personnel Action Entry Procedures

NEW HIRE OF AN EXTERNAL APPLICANT USING eRecruit WHEN THE APPLICANT HAS NO PREVIOUS WORK HISTORY IN HCM

This document is intended to provide users of the HCM 8.8 database with instructions on how to use the Applicant Hire process to hire an external applicant who has no previous history in HCM. Screen shots are provided to aid in ease of navigation through the process. In order to use this functionality, you must have access to the State of Vermont HCM web site, a valid user ID and a valid password. Users must first log into the PeopleSoft web site http://hcm.per.state.vt.us/psp/HRPRD/?cmd=login and then follow the detailed instructions below.

Friday after payday is first day to enter records for next pay period (pay period begin Sunday).

NO hires with retroactive effective dates (dates that occurred before the pay period you are entering records for) **until the Monday of pay week. This request is based on the fact there will be no Paradox data for the pay period if a hire or rehire record is entered after deadline for the pay period.**

IMPORTANT NOTE: Before entering a new hire record using the Hire Applicants functionality, you must first determine if the applicant has previously worked for Vermont State Government. See **OVERVIEW OF eRecruit, POSITION MANAGEMENT AND JOB DATA NEW HIRE, REHIRE, TRANSFER OR ASSIGNING AN ADDITIONAL JOB** for additional information.

- ✓ **Check the position for accuracy.**

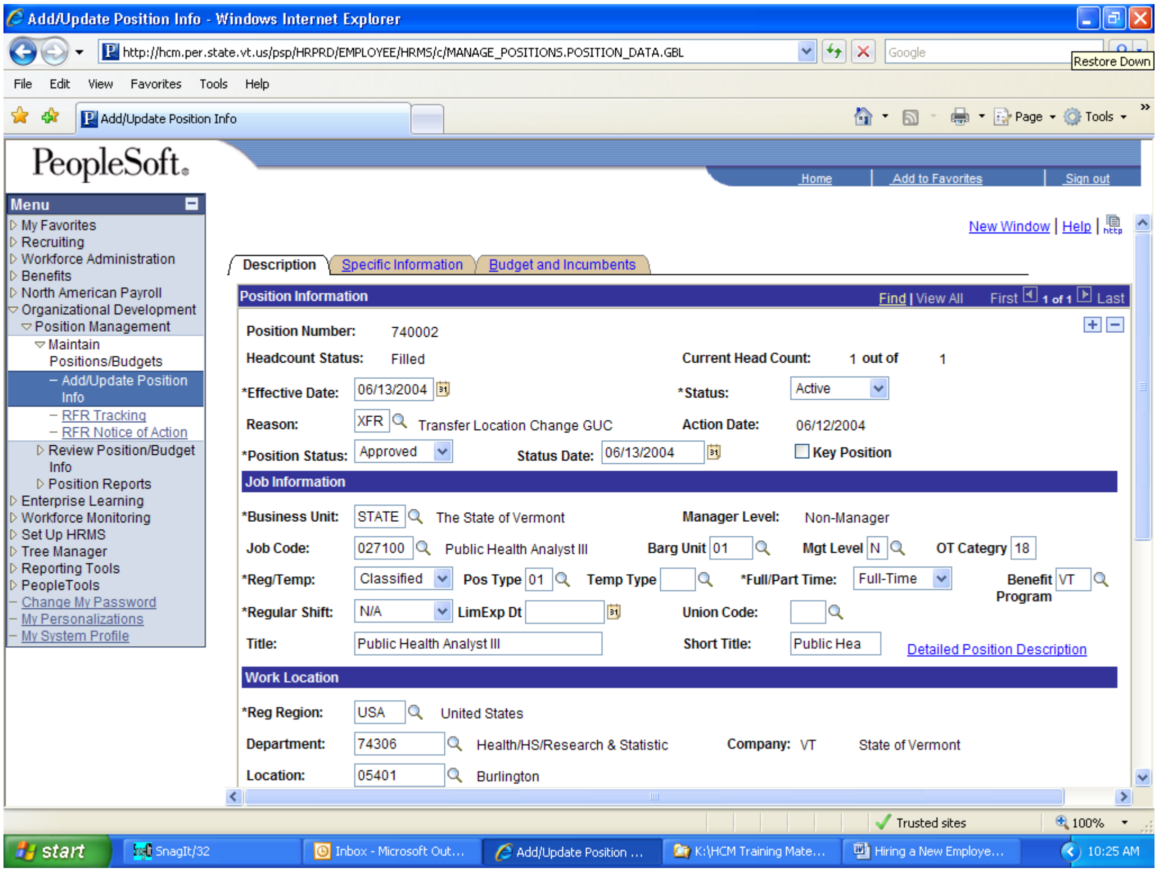
Navigate to **Organizational Development> Position Management> Maintain Positions/Budgets> Add/Update Position Info.** Type in position number and search.

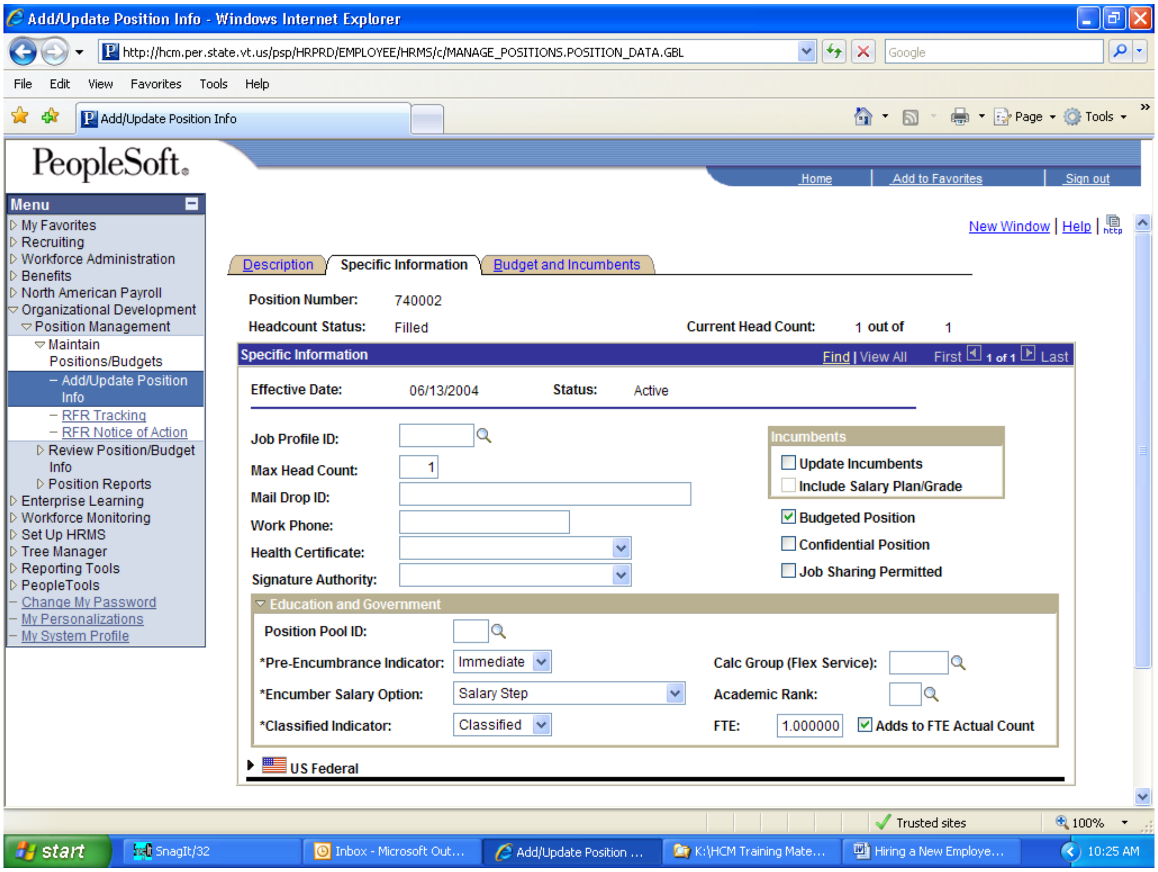
Things to verify in Position Management prior to processing the new hire transaction:

- ✓ Is the schedule set up correctly in the position? Check the full or part-time status along with standard hours (**located on the Description page**) and FTE (**located on the Specific Information page)**. See screen shots on following page.

- ✓ Ensure the three fields indicating full or part-time status accurately reflect the schedule this employee will work – **for example:** an employee working 20 hours per week would have an FTE of .50, standard hours of 20 and the status would be part-time. However, in a job share situation the position would appear as full-time and each employee would appear as part-time in their specific Job Data records.

- ✓ Also ensure the Adds to FTE Actual Count box is checked on the Specific Information request. The FTE box is checked whether the position is full or part-time.





On the Description page

- ✓ Is the overtime category correct for the pay grade?
- ✓ Is the Reg/Temp field set to the correct position type? Exempt, Classified, Temporary, etc?
- ✓ Is the GUC (department field) correct?
- ✓ Is the Location (zip code) correct?

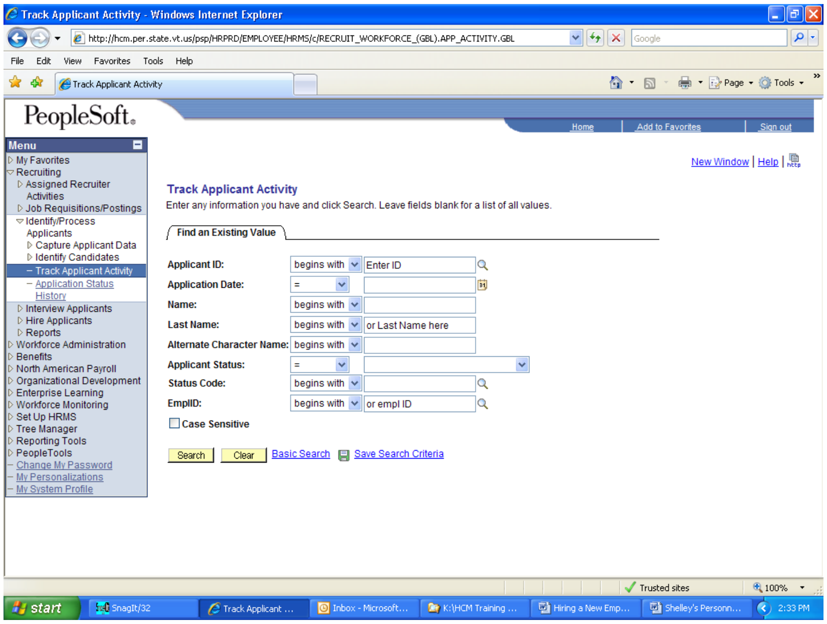
If changes are required, see additional documentation regarding position updates to Governmental Unit Codes, standard hours etc.

If a correction or deletion of a record is required please contact HRIS.

After reviewing the position for accuracy, navigate to **Recruiting > Identify/Process Applicants > Track Applicant Activity** and search for the applicant using Applicant ID or Name.

Once you select the applicant, you may receive a list of Application Dates associated with this individual. The job requisition is located under the date the applicant actually applied to the job requisition.

Navigate by clicking on the Application Date until you find the appropriate job requisition before you proceed.



There are times when the applicant applied for more than one job on the same day. It will become apparent when you are in an Application Date for a particular employee. The Job Requisition bar will include 1 of 2 (or more).

If the applicant has applied to multiple jobs on one effective date you can ‘view all’ to see each requisition applied to for that particular date. You do so by clicking the ‘view all’ link which will be available on the Job Requisitions bar.

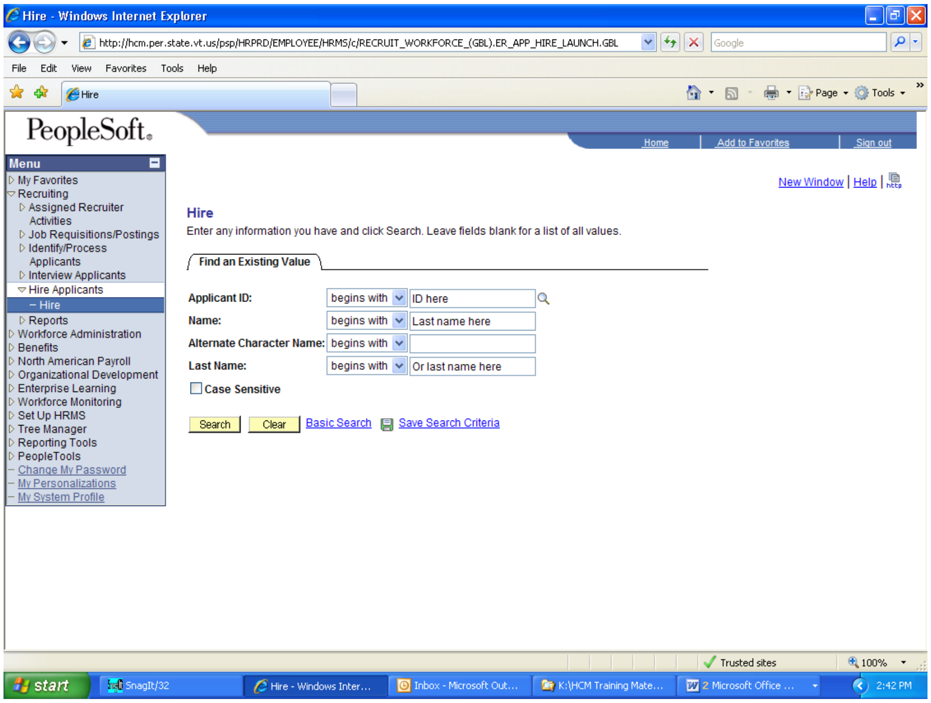
Using ‘view all’ will allow you to see multiple job requisitions for the same application date.

Once you have identified the appropriate job requisition for the applicant, click the arrow in the **Disposition** box and select the choice of **080-Ready to Hire** (do not change the status date). Tab out and click **Save.** See the following page for screen shot.

Setting the applicant 080 – Ready to Hire will bring eRecruit and Position Management data forward into Workforce Administration once the New Hire record is saved using the Hire Applicants functionality.

- To recap – you have reviewed Position Management and set the applicant 080-Ready to Hire. Verifying the accuracy of data will reduce the number of errors with this transaction.

To hire using the Hire Applicant functionality, navigate to **Recruiting > Hire Applicants > Hire** and enter the Applicant ID in the appropriate field and hit the Search button. You can also search by last name. This will take you to the **Applicant Hire** page. See next page for screen shot.



Once on the Applicant Hire page you will see two radio buttons giving you the option to either assign an employee ID or allow the system to automatically assign an ID.

Note: Unless instructed otherwise, **do not change** the Automatic EmplID Assignment radio button, or enter an EmplID at this time. The system will automatically assign the Employee ID number when the transaction is saved.

Do review the applicant's data as well as the job requisition and position data as it appears on the Applicant Hire page to ensure you have the correct applicant and position information for the new hire transaction you are entering.

After review of the data, select the **Personal Data** hyperlink at the bottom of the page.

Here you will find four pages of personal data. The system will bring forward the applicant's information as it was submitted during the eRecruit application process. The Effective date on all four pages will default to the day you are entering the record. If not the date of hire the date will need to be changed on each page.

It is important that you carefully review and correct where necessary the Personal Data information on the Name History, Address History and Personal History pages. If not already there, you must also enter the applicant's date of birth, SSN and Ethnic Group on the Identity/Diversity page.

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NOTE: It is important that the name fields follow standard PeopleSoft naming conventions. The First and Last names should begin with a Capital letter and the remaining letters must be lower case. The Middle Initial must be a Capital letter with no punctuation. Many applicants have entered their names in either all upper or lower case. You MUST correct the name to the proper naming convention before you save the record. If the applicant entered a prefix and/or a suffix, make sure they selected from the choices given in the appropriate drop-down box.

On the Name History page

- If necessary, change effective date to first day actually worked (hire date)
- Ensure employee's name is entered using mixed case – use Refresh the Name Field button to review any update to the name as it appears on the bottom of page

On the Address History page

- The default Address Type is home
- If necessary, change effective date to first day actually worked (hire date)
- If necessary, make corrections to home address by clicking on the Enter/Edit Address link. Make correction, click OK and verify accuracy of address in Address History

On the Personal Information page

- In necessary, change effective date to first day actually worked (hire date)
- If necessary, enter gender and marital status (if known)

On the Identity/Diversity page

If not already there, you must also enter the applicant's date of birth, SSN and Ethnic Group on the Identity/Diversity page.

- Enter DOB MM/DD/YYY – this page calculates the employee's age in years and months.
- Enter Effective Date under Referral Source and, if necessary, change effective date to first day actually worked (hire date)
- Enter the employee's Social Security Number in the National ID field
- Click the USA flag and review/select appropriate Ethnic Group

DO NOT SAVE YET

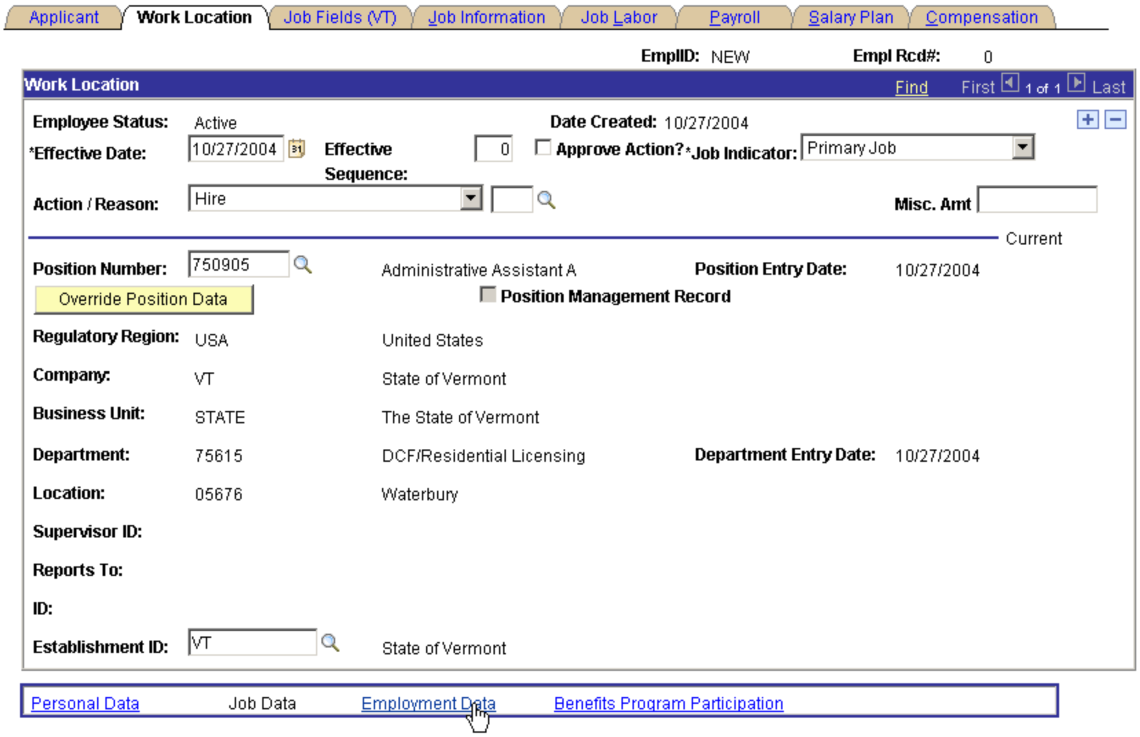
This concludes the Personal Data input. At the bottom of the page, click the Job Data link to display the next section.

You will note that position information has already populated on the **Work Location** page. Again, this data came forward from the data located in the job requisition in eRecruit and Position Management. This is why it is vital to review Position Management prior to processing the new hire transaction through eRecruit.

The effective date should come forward from the Personal Data pages. If the date is incorrect, return to Personal Data using the hyperlink at the bottom of the page. Once there, correct the effective date located on each of the four pages.

The action code will appear as **HIRE**. Tab to the Reason field and choose **NEW** from the reasons available.

Verify that Job Indicator is set to "Primary" (for additional information concerning Primary/Secondary jobs, see Assign Additional Job)



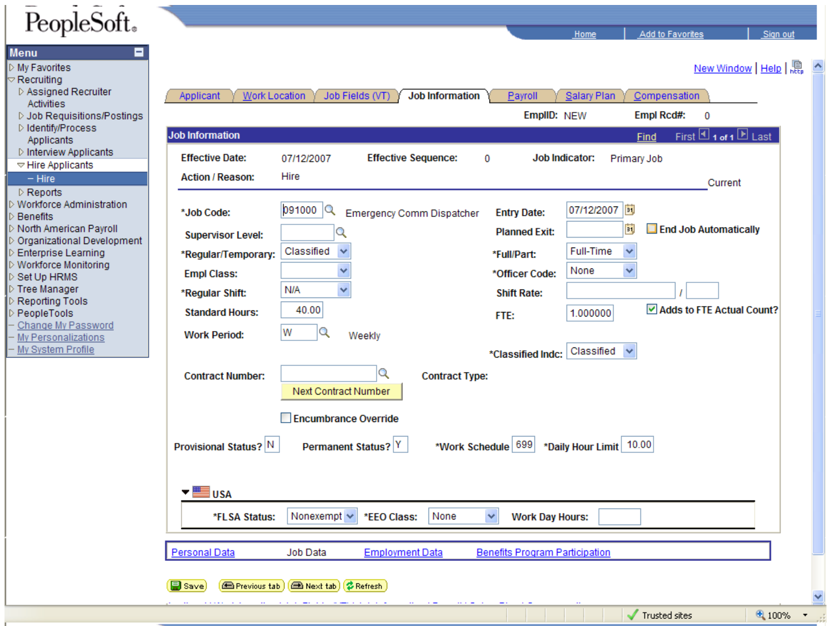
Verify Position Number, Department (GUC) and Location (zip code)

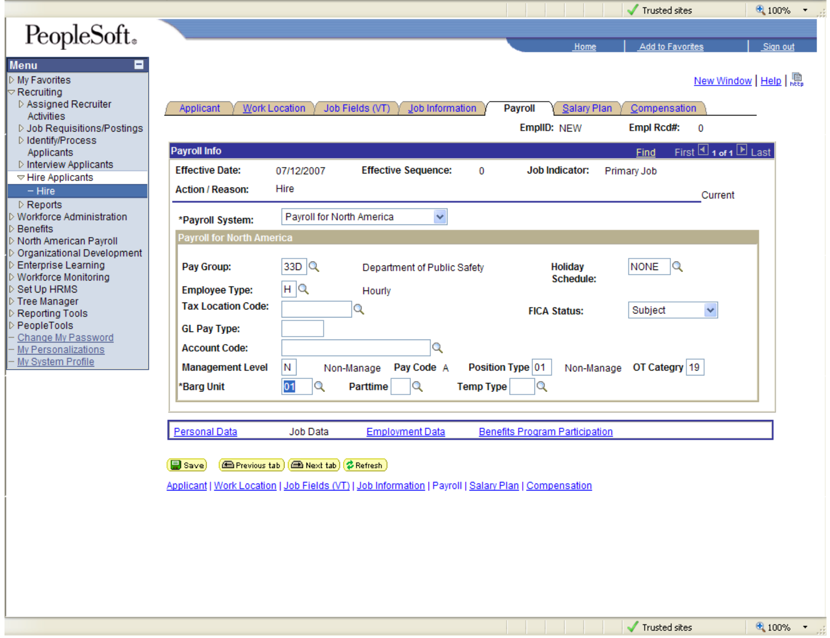
Example of Overriding Position Data

There are times when an employee's record does not match Position Management. Job share situations are an example. Another example would be when a new hire is also working an approved alternate work schedule.

If there is a need to override data located in Position Management – you will use the yellow Override Position Data button located on the Work Location page just below the position number to open the fields associated with the position. This override is used to manually change data specific to the employee only. **Please note**, you must leave the employee's job data in override or position data will come forward from Position Management defaulting all data back to what appears there (**including the hiring step associated with this particular job code as well as the hourly rate**).

In the case of an approved alternate work schedule you would change the Work Schedule on the Job Information page and the Overtime Category on the Payroll page. You would also include a comment regarding the alternate schedule on the Job Fields(VT) page.





In the example of an overtime category change based on an employee working more than 8 hours in a day. This type of change is made only in the employee's job data. To receive approval you would submit a request and receive an approved category from the Labor Relations division of the Department of Human Resources before changing this data.

On the Job Fields (VT) page

The system automatically places an employee in a six-month original probation if the reg/temp field is set at Classified. Therefore, there is no need to enter the end date of the original probationary period into the Prob Type/End Date field. The date will be calculated as (effective transfer date + duration of probationary period – in most cases, six months). You can check this date after the new hire transaction is saved.

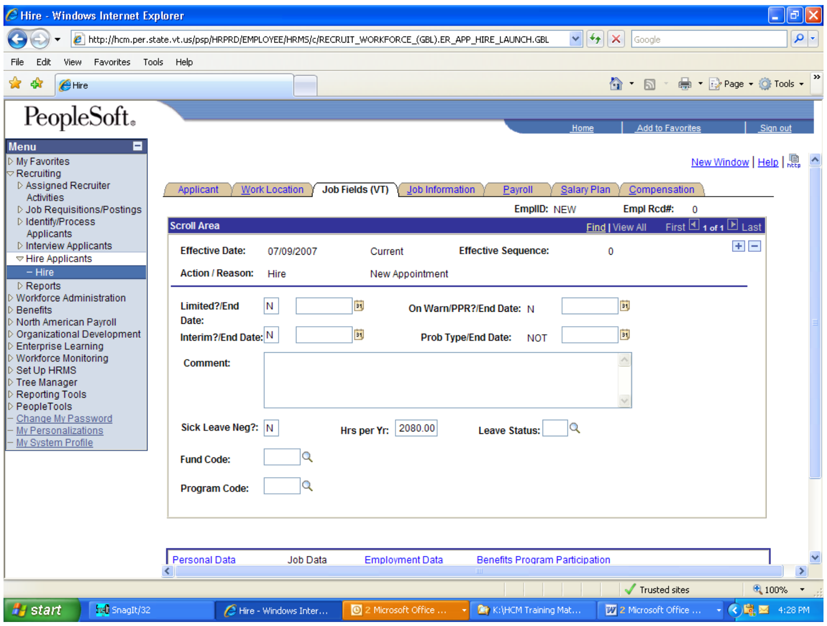
Depending on the specific circumstances of this new hire, you may want to enter a Limited or Interim Y with an end date if appropriate.

Enter comments (if any) – for instance, alternate schedules, hire-into-range with a DHR approval date, job-share, etc.

Enter Fund & Program codes (if used)

This page also includes a field titled 'Hrs per Yr:'.

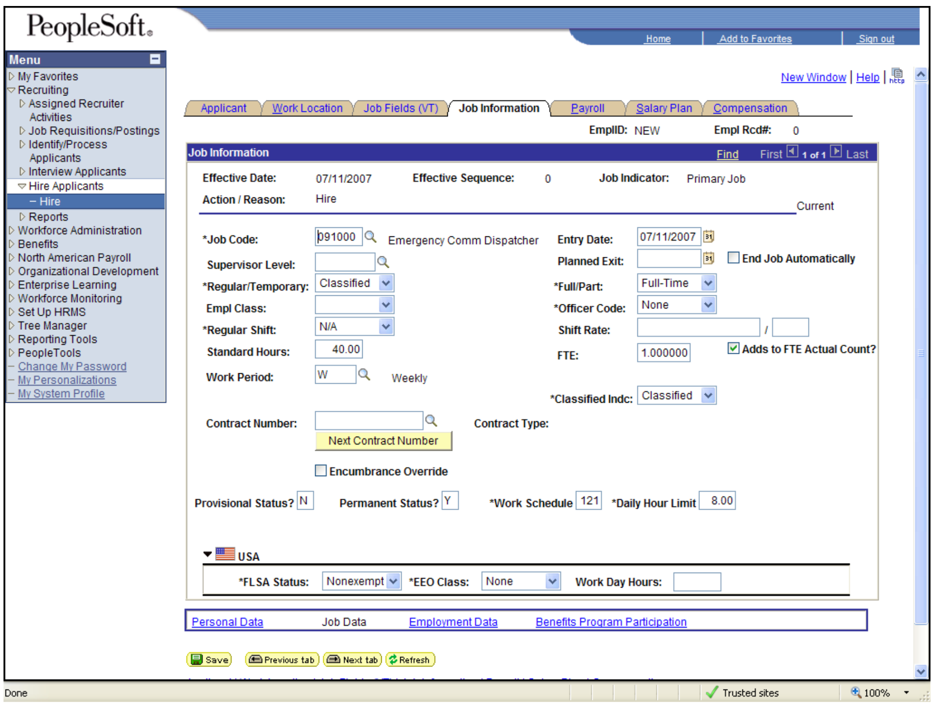
There are approximately 38 position titles that include hours per year greater than 2080. Those positions are mainly located with ANR, Military, DPS and Woodside. In most cases, this number will be 2080. If in doubt, contact the Labor Relations or HRIS division of the Department of Human Resources for additional information. Only change the data if the hours worked are greater than 2080.



On the Job Information page

Again, notice that most of the fields on this page are already populated – this data came forward from Position Management.

However, in the examples given previously – the Job Information page would require changes if an employee is part-time but the position is full-time (the job-share situation). In the example of a job share, you would change the Full-time to Part-time and adjust the Standard Hours and FTE to match the employee's schedule. You would use the Override Position Data button on the Work Location page to make these fields of data available for override. **Please note**, you must leave the employee's job data in override or position data will come forward from Position Management defaulting all data back to what appears there (**including the hiring step associated with this particular job code as well as the hourly rate**).



- Verify Job Code

- Verify the Regular/Temporary field reads correctly

Remember, if this field is set at Classified and you are hiring a temp, exempt or contractual employee – the system will automatically place the employee on original probation. If the data is incorrect, use your left-hand navigation to return to Hire Applicants >Hire – hit

Cancel to continue without saving your data. Correct the data in Position Management and start the hire transaction over.

- Verify Full/Part, Standard Hours and FTE are accurate

- Check Permanent Status (Y for Classified, N for temp, contractual)

- Check Work Schedule (121, 699 or 300)
- Verify Daily Hour Limit and Work Schedule

- Do nothing with the FLSA Status, EEO Class or Work Day Hours.

On the Payroll page

- Verify Pay Group

- Enter Tax Location Code (usually the same as Location from the Work Location page)

- **FICA Status is almost always Subject – do not change this field** to Exempt or Medicaid Only unless you have communicated with the Payroll division.

- **Management Level, Bargaining Unit, and Position Type** are fields that populate from Position Management and should not be changed by anyone other than a staff member from the Classification division of the Department of Human Resources. **Do not override this data.**

- **OT category** comes forward from Position Management

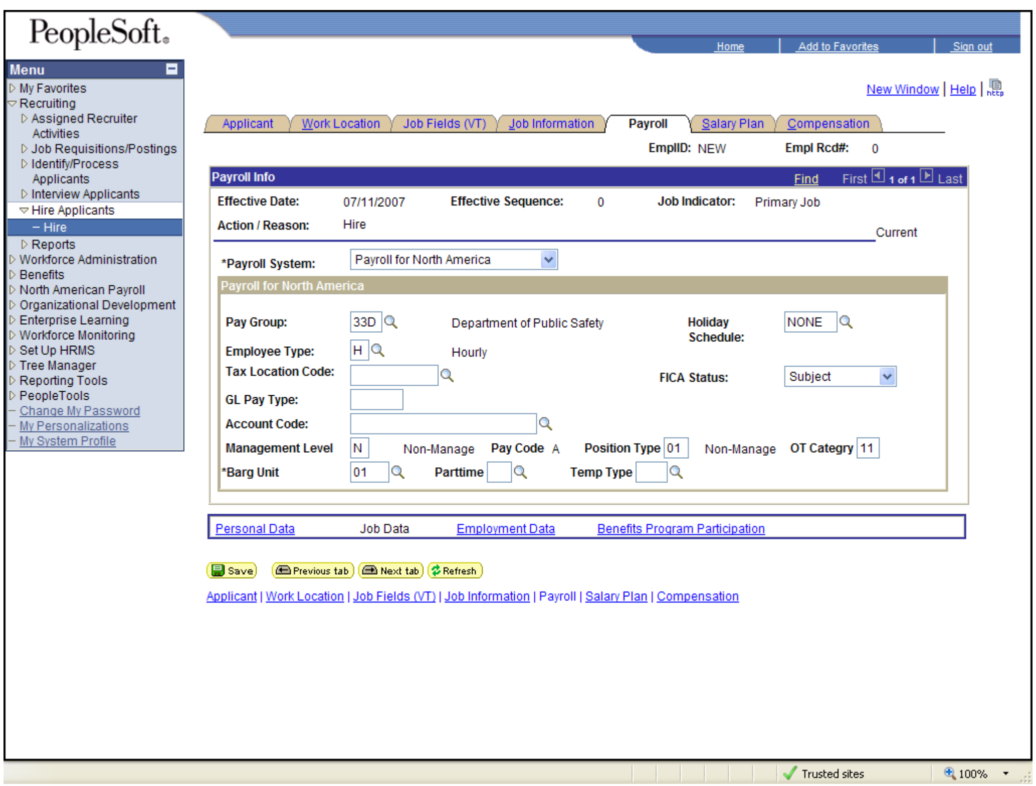
May require changing if this employee is in an approved alternate schedule **OR** is in a pay grade 23 or higher and is being allowed a cash/comp option for overtime compensation (in those cases the OT category would be 37 for pay grade 23 and category 38 for 24 or higher).

- If this employee is not working a full week or a full year you will want to choose the appropriate status from the dropdown menu on the Parttime field.

FP	Full Time / Part Year
PF	Part Time / Full Year
PP	Part Time / Part Year

- Temp Type also comes forward from Position Management.

Screen shot on following page.



On the Salary Plan page

- Verify Paygrade

- Enter step if this is a hire into range (and include a comment on the Job Fields (VT) page 'HIR; with the DHR approval date')

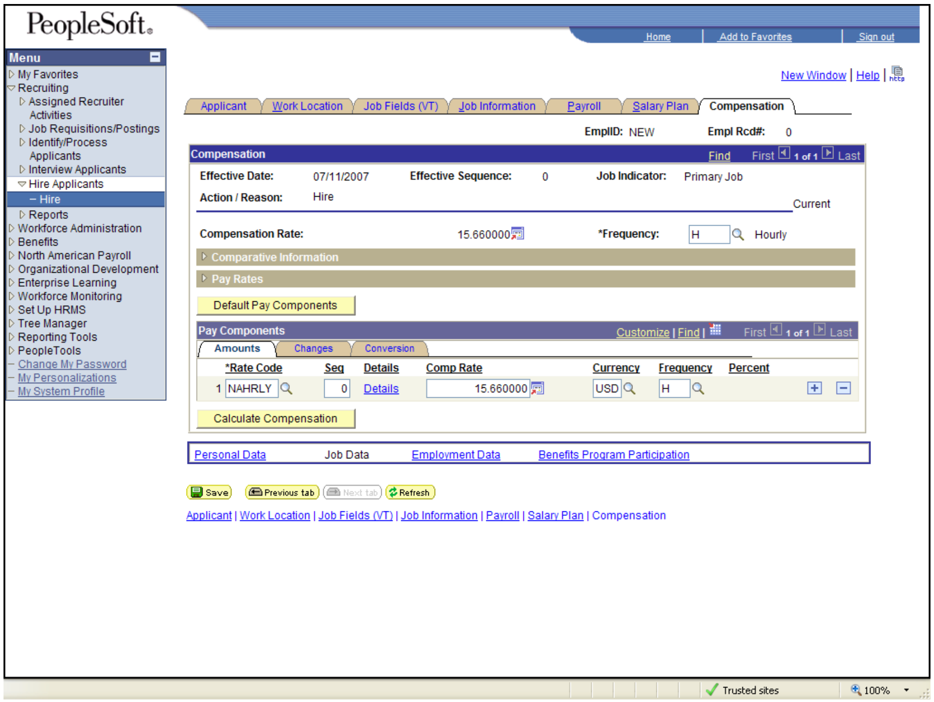
- Enter Next Step Date (effective date plus time for hire step).

The required time on each step in the Step Pay Plan shall be as follows:
Step 1 (probation) - normally, 6 months
Step 2 (EOP) - one year Step 9 - two years
Step 3 - one year Step 10 - two years
Step 4 - one year Step 11 - two years
Step 5 - one year Step 12 - two years
Step 6 - two years Step 13 - three years
Step 7 - two years Step 14 - three years
Step 8 - two years Step 15 - final step

On the Compensation page

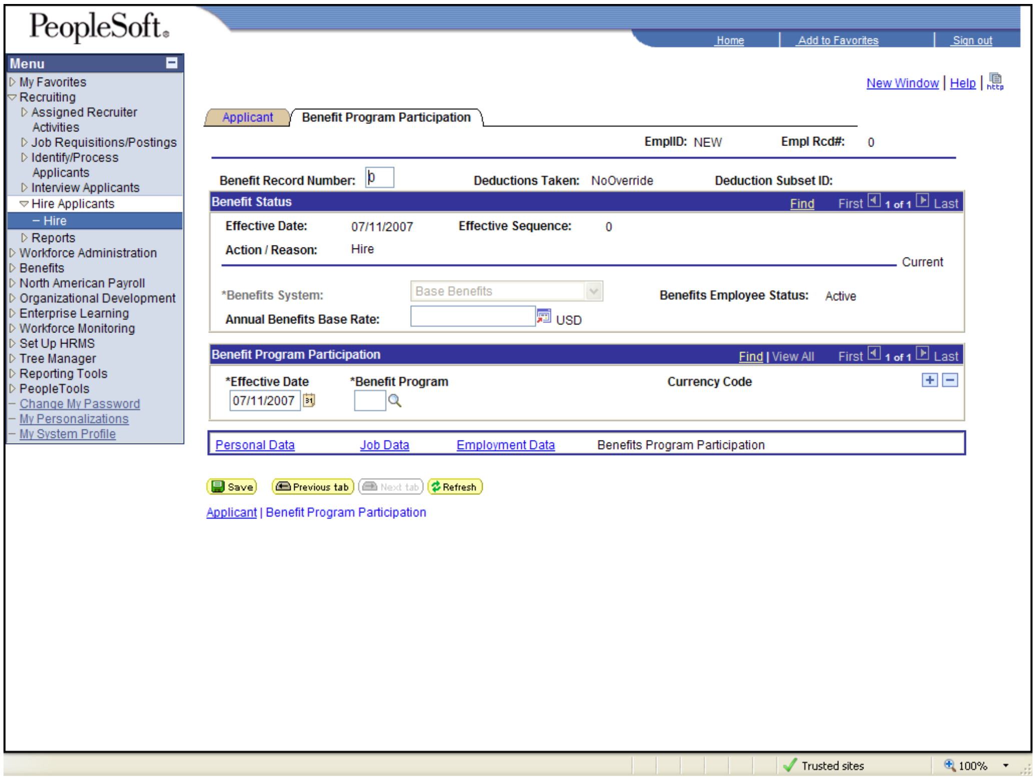
- Verify hourly rate in Comp Rate field at the bottom of the page matches the pay grade and step you've entered on the previous page.

Click the yellow Calculate Compensation button and verify the rate at the top of the page matches the rate at the bottom.
Screen shot on following page.



DO NOT SAVE YET

At the bottom of the page, click the Benefits Program Participation link to display the next section.



On the Benefits Program Participation page

- Change effective date to first day actually worked (hire date)

- Enter Benefit Program –

VT for positions eligible to receive benefits (Position Type 01, 02, 04, 05, 80, 81, 82, 83, 84, 85, 87, 86)

VTE for those positions not eligible to receive benefits (Position Type 65, 66, 70, 88, 89)

Tab back through all pages in the three links you have worked in to verify the data.

SAVE

When you have completed and saved the hire record, the job requisition data will be updated. The status of the applicant who was hired will be changed to **090-Hired.** If there was only one opening for the requisition, the status of the remaining applicants will change to **110-Not Hired** and the requisition will close. If there were multiple positions, then the status of the remaining applicants will not change until all positions are filled.

You will also receive an employee ID

To verify work

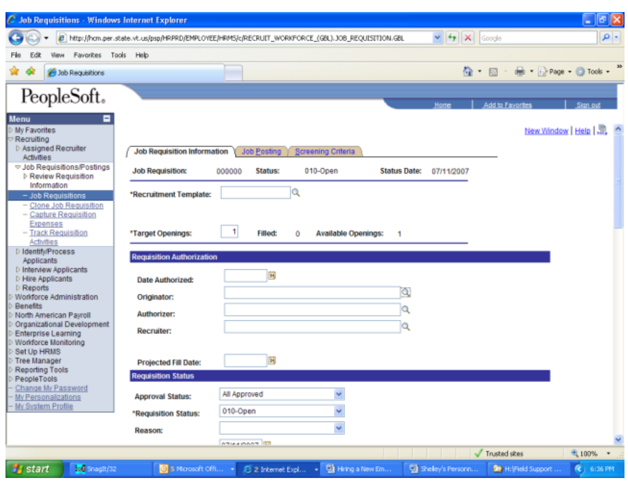
Navigate to Workforce Administration > Job Information >Job Data and search by Employee ID.

On the Job Fields (VT) page

Verify the employee was placed on original probation if this is a Classified employee

Navigate to Recruiting > Job Requisitions/Postings >Job Requisitions
Search by your job requisition

On the Job Requisition Information page
The Target Openings, Filled and Available Openings should have changed based on the number of openings associated with this particular requisition.



In addition, scroll down until you reach the Hire Applicant Details to view the name of the employee you just completed the new hire transaction for.

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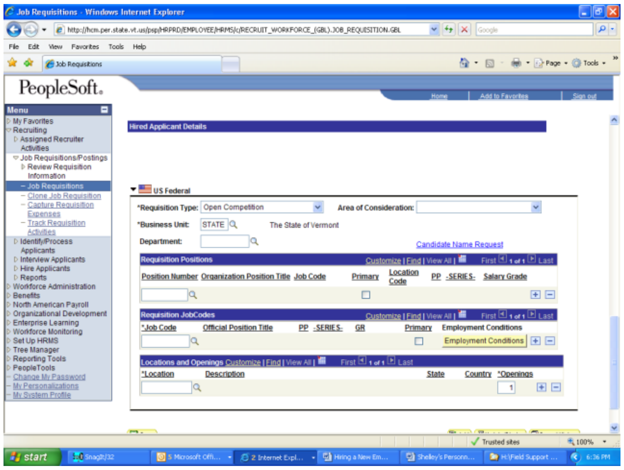

This information is intended to provide general information, and to demystify some of the technical procedures. Again, this is an overview. Individual situation will vary. It is important to read bargaining unit and policy language and/or to contact the Department of Human Resources with questions concerning the specifics of your situation.

Unless otherwise notified, deadline for HCM record entry is Tuesday of a pay week at 4:25 p.m.

NO data entry of records by field staff after deadline without prior approval from HRIS.

Friday after payday is first day to enter records for next pay period (Sunday).